



Dakotas
United Methodist
Foundation



PO Box 460
Mitchell, South Dakota 57301

CHARITABLE GIFT ANNUITY APPLICATION

I/We hereby make application for a Charitable Gift Annuity in the amount of \$_____ and enclose (Check____)(Other____) to the Dakotas United Methodist Foundation for the same.

Issued to: #1 _____ #2 _____
(Please use full name, i.e. George Allan Smith/Mary Ann Smith.)

Street _____

Address:

City, State & Zip Code _____

Date of Birth: # 1 _____ # 2 _____
Month Day Year Month Day Year

Social Security Number: # 1 ____ - ____ - ____ # 2 ____ - ____ - ____

Income Tax Rate (circle one) 10% / 15% / 25% / 28% / 33% / 35% / 39.60%

I/We request Annuity Payments be paid: () Annually () Semi-Annually () Quarterly

It is to be understood that if at the death of the donor, or last donor of a multiple-person annuity, if the designated remainder beneficiary institution is no longer a tax-exempt entity as defined by Section 501(c) (3) of the Internal Revenue Code, or any other applicable tax provision then in effect, then in anticipation of that event the donor may, on the annuity form, provide for an alternate beneficiary, or beneficiaries, and in the event that there are no, any or all, such designated beneficiaries, or alternate beneficiaries, that qualify as tax-exempt organizations, then in that event the Foundation Board of Directors, or its successor, may choose other qualified tax-exempt beneficiaries served by the Foundation. In no event shall the remainder beneficiary be other than a 501(c) (3) tax-exempt organization. **Alternate Beneficiary (If other than Foundation):** _____.

BENEFICIARY: Dakotas United Methodist Foundation, 1331 W University Avenue, Mitchell, South Dakota 57301 (Please check appropriate box.)

Foundation Ministry Endowment: (List name of Ministry) _____

Direct Gift to Church (90% to named church, 10% undesignated to the Foundation)
Name of Church _____

Dakotas United Methodist Foundation - to establish an Endowment to benefit:

Other: (must be United Methodist related): _____

Note: The policy of the Dakotas United Methodist Foundation is that typically gifts received are to be considered permanent endowment gifts, with a set annual percentage going to the designated recipient, unless otherwise specifically restricted or directed by the donor. Any direct gift to a beneficiary, the Foundation asks for a tithe (ten percent) of the residual amount. Also, the Dakotas United Methodist Foundation retains the right to re-direct the net earnings from any and/or all endowment funds in situations in which the recipient ministry, institution or agency discontinues operation, dissolves, sells, merges or otherwise changes its mission or purpose.

Date: _____ **SIGNATURE** _____

